

Navigating Resilience

Key insights for Health industry leaders

The current situation for Health organizations

Health organizations face moderate yet meaningful and complex exposure to tariffs, particularly within the provider supply chain for medical supplies, devices and pharmaceuticals.

15-20%

of health organizations' revenue is spent on supplies and medications, much of which is sourced or manufactured outside the US

1-3%

hospital margins; tariffs, combined with government funding reductions and current workforce challenges, place further strain on health financials and operations

\$4,900

potential additional yearly costs for US households

Global

Outside the US, health organizations may see disruptions to their supply of pharmaceuticals, devices and medical supplies, with increases in cost as supply chains evolve

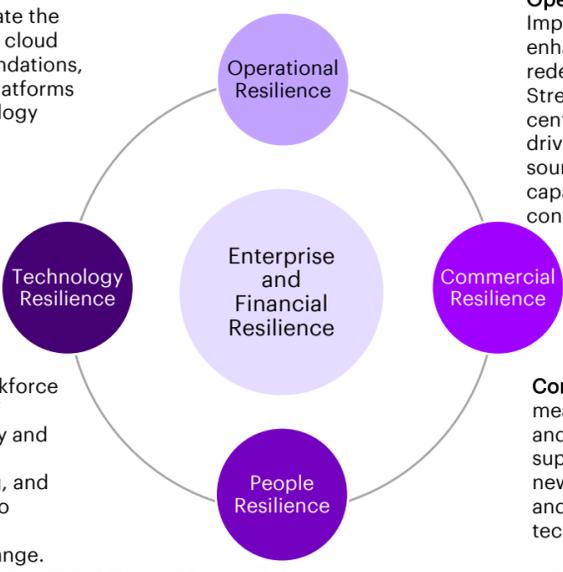
Health leaders' concerns

- Supply Chain Resilience:** Tariffs may lead to procurement instability, rising prices, and the risk of critical shortages in medications or medical devices.
- Clinical Continuity and Patient Access:** Disruptions in critical supplies risk compromising care quality, access, or delayed treatment. Substitutions may affect outcomes.
- Cost Containment and Increasing Margin Pressure:** Increased costs from tariffs collide with already tight margins and budgets, requiring rapid efficiency gains to offset headwinds.
- Strategic Risk, Budget and Planning Volatility:** Shifting tariff structures force the adoption of new approaches to scenario planning, budgeting and enterprise risk management.
- Workforce Shortages and Talent Mobility:** Burnout and workforce shortages may be amplified by additional cost cutting and potential supply interruptions.

What makes a resilient Health organization?

Resiliency will be the key differentiator for organizations who can navigate this uncertain economic and policy environment – this covers commercial, operations, people, and technology. Scenario planning is a critical to building enterprise and financial resilience.

Technology Resilience: Data and systems readiness. Create the Digital Core by building cloud infrastructure, data foundations, and AI to secure core platforms and unlock new technology opportunities.



Operational Resilience: Improve health outcomes by enhancing clinical workflows and redesigning care models. Streamline, standardize, and centralize corporate functions to drive down costs. Augment sourcing and supply chain capabilities to maximize continuity and protect margins.

People Resilience: Workforce readiness; new ways of working bringing clarity and purpose. Dynamically engaging, empowering, and skilling the workforce to prepare for continued transformation and change.

Commercial Resilience: Build meaningful patient engagement and partner relationships that support clinical outcomes. Create new revenue and funding models and launch services that leverage technology and fuel innovation.

Resilience for competitive advantage today and tomorrow

Resilience across these dimensions is the key to responding to the uncertain economic and policy environment ahead. Consider no regret moves that will yield value regardless of how the tariff environment evolves.

	What to do Now	What to do Next
Enterprise & Financial Resilience	Conduct rapid scenario planning and vulnerability assessments	Reassess and diversify revenue, funding and supply channels
Operational Resilience	Implement productivity initiatives across admin, clinical, and support functions	Transform care models to include more virtual care hubs and digital agents
Commercial Resilience	Expand existing telehealth capacity, services, and marketing (minimal supplies required)	Recalibrate global partnerships and contract models in response to fragmentation and localization
People Resilience	Begin extending deeper AI training and tools to power the workforce	Augment workforce models with technology and intelligent virtual agents
Technology Resilience	Prioritize current and planned initiatives based on ROI and cost savings	Enabled by AI: Build agentic architecture to create human capacity and reinvent productivity

To learn more about how to turn resilience into a competitive edge visit:

<https://www.accenture.com/us-en/insights/strategy/navigating-new-tariff-landscape-economic-impact>